



State of California

# Employment Training Panel

Arnold Schwarzenegger, Governor

September 2, 2008

Julie Nord, Managing Owner  
Nord Coast Vineyard Services  
1326 Hillview Lane  
Napa, CA 94558

Dear Ms. Nord:

RE: **FINAL MONITORING VISIT REPORT** for Nord Coast Vineyard Services – **ET08-0396**

<b>Date of the Visit:</b>	06/11/08
<b>Beginning/Ending Time:</b>	10:00 am – 11:00 am
<b>Date of Last Visit:</b>	04/30/08
<b>Visit Location:</b>	1326 Hillview Lane, Napa, CA
<b>Persons in attendance:</b>	Nord Coast Vineyard representative: Jon Kanagy, co-owner/manager; Employment Training Panel representatives: Kristie Ohta and Kerri Muraki, Project Analysts
<b>Action Required:</b>	No

## **CONTRACT INFORMATION:**

<b>Term of Agreement:</b>	03/04/08 – 03/03/09	<b>Agreement Amount:</b>	\$16,380
<b>Training Start Date:</b>	03/04/08	<b>No. to Retain:</b>	14
<b>Date Training must be Completed:</b>	12/02/08	<b>Range of Hours:</b>	8 - 60
<b>Type of Trainee:</b>	Retrainee	<b>Weighted Ave. Hours:</b>	45

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ETP (04/15/05)

**FINAL REPORT SUMMARY:**

- ***HISTORY OF AGREEMENT CHANGES***

The Agreement was executed on 03/14/08 and training began on 03/04/08. Your staff reported that all training was completed on 04/18/08, which allows for the 90-day retention period to be completed within the term ending date of the Agreement – 03/03/09.

- ***INTERVIEW WITH THE SIGNATORY, Julie Nord, Managing Owner (via teleconference)***
  - What barriers, if any, did your company experience in implementing your ETP project? It was easier than I thought it would be. The small business fast track really helped.
  - What problems, if any, did your company experience with ETP record keeping? The only thing was I filled out each record by hand before I realized it needed to be done online.
  - What assistance could ETP have provided that would improve the process for future Contractors?  
Having two separate web sites to fill in employee information is confusing. Also, some of the names of the documents to fill out aren't intuitive, so I couldn't have done it on my own, without Kerri walking me through everything.
  - How did your company benefit from the ETP training?  
The employees chosen felt they must be very important to the company to have been selected for training. Employees are paying more attention to vineyard practices and letting management know if there are problems.

Mr. Kanagy provided Ms. Muraki with projected statistics for the closeout of the Agreement. According to your records at the time of this final meeting, you expected to retain a total of 17 trainees for a total reimbursement of \$16,380, (100 percent of the encumbered amount). Mr. Kanagy stated that the closeout invoice will be submitted by August 2008.

Nord Coast Vineyards Services records show that 17 trainees have completed training (121% of planned retentions) the contractor plans to have all 17 trainees complete the 90 day retention period by August 2008. Nord Coast Vineyards Services projects earnings to be \$16,380 (100% of the encumbered total.) Current records show that Nord Coast Vineyards Services has received \$12,285 in progress payments. Ms. Muraki reminded Mr. Kanagy that the closeout invoice should be submitted no later than 30 days after the end term date of the Agreement.

**PROJECT STATUS PROVIDED BY THE CONTRACTOR:**

<b>Trainees Started Training:</b>	17	<b>Completed Retention:</b>	0
<b>Dropped Following Enrollment:</b>	0	<b>In Retention Period:</b>	17
<b>Completed Minimum Hours for reimbursement:</b>	17	<b>Awaiting Placement:</b>	17
<b>Completed Training:</b>	17		

**ATTENDANCE ROSTERS:**

Attendance rosters were reviewed and were within compliance of ETP standards.

**SUBAGREEMENTS:**

Approved Training Subcontractor: SHARON BONTRAGER \$1,580.00

**INVOICES:**

Invoice was reviewed and the trainees listed will be complete retention in August 2008.

**AUDIT:**

Nord Coast Vineyards Services will be notified in writing if this agreement is selected for an audit, conducted either at your site (field audit) or by telephone (desk audit or "review"). The Audit Notification and Audit Confirmation letters will be sent in advance to allow ample preparation time and will include a list of documents that will be examined by the auditor. To provide support of training, original training attendance documentation is required; photocopied records are not acceptable. Listed below are types of records typically requested during an ETP field audit:

- Training attendance records such as rosters, sign-in sheets, etc.
- Payroll records of individual trainees to verify wage and hours worked
- Personnel records regarding occupation and dates of employment
- Documentation of employer paid health benefits (if applicable)
- Cash receipts to verify receipt and accounting of ETP funds

**RECORD RETENTION:**

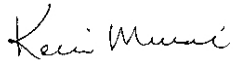
Records must be retained within your control and be available for review at your place of business within the State of California. This responsibility will terminate no sooner than four (4) years from the date of the termination of the Agreement or three (3) years from the date of the last payment by ETP to the Contractor, or the date of resolution of appeals, audits, claims, exceptions, or litigation, whichever is later.

If you have any questions regarding your contract or the contents of this Final Visit Monitoring Report, please contact Kerri Muraki at 916-327-5677 or [kmuraki@etp.ca.gov](mailto:kmuraki@etp.ca.gov) within ten (10) working days upon receipt of this document.

Sincerely,



Ruby Cohen, Manager  
Sacramento Regional Office



Kerri Muraki, Project Analyst  
Sacramento Regional Office

cc: Contractor's Representatives

Brian McMahon, Executive Director  
Amber Luiz, Assistant Director (for Small Business Projects only)  
David Guzman, Chief, Program Operations Division  
Kulbir Mayall, Manager, Fiscal and Certification  
Master File  
Project File

Date report mailed to Contractor           \*\*